



Welcome!

July 11, 2023



Jason Lusk

Associate Vice President,
Convention Sales

2023 in a Word



Growing Demand Across All Segments



A return to more “normalized” growth for domestic leisure travel, which will remain resilient despite some headwinds



Rapid 2023 growth in domestic business travel, with a slight slowdown toward the end of the year and into 2024 due a still-expected mild recession. A full recovery in terms of volume has been pushed to 2025 and inflation-adjusted spending recovery remains beyond the range of the forecast

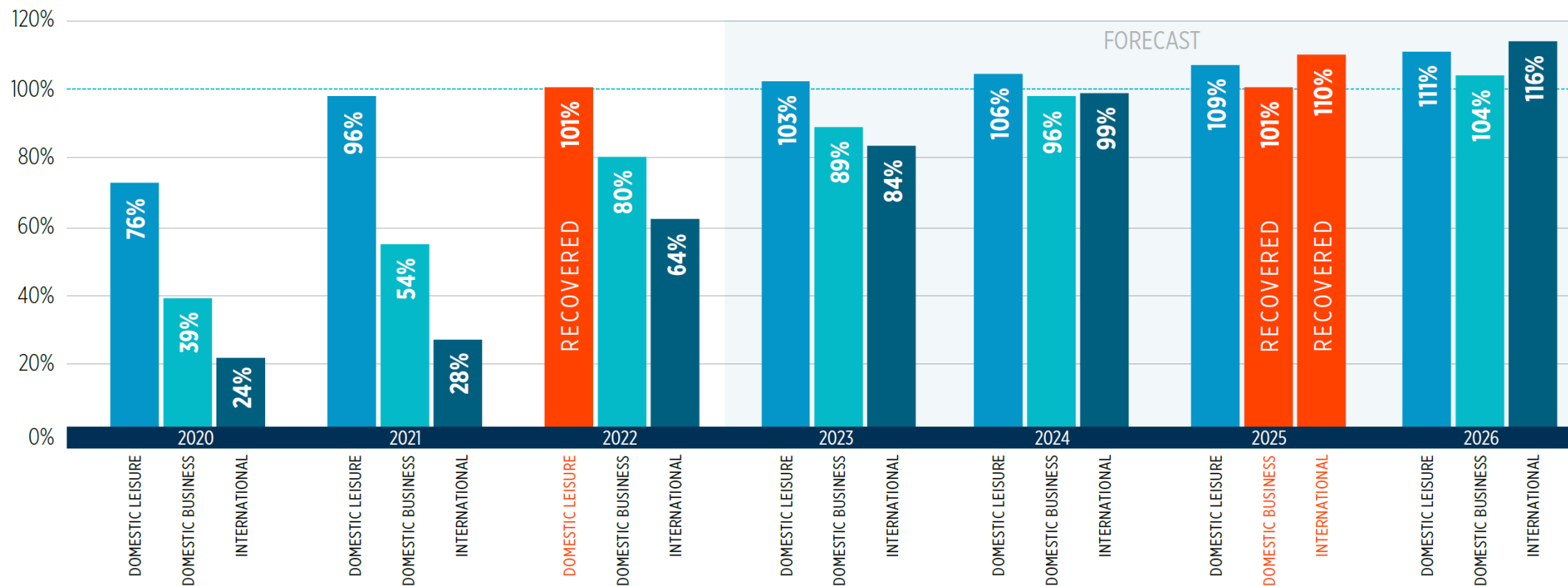


A boost in international visitations. While still far behind, international inbound travel is expected to experience the strongest growth of any segment throughout the range of the forecast, nearing full recovery in 2024 and exceeding it in 2025

All Markets on Road to Full Recovery

Recovery Forecast for Domestic & International Travel Volume

% RECOVERED COMPARED TO 2019



Source: U.S. Travel Association

Traveler Sentiment

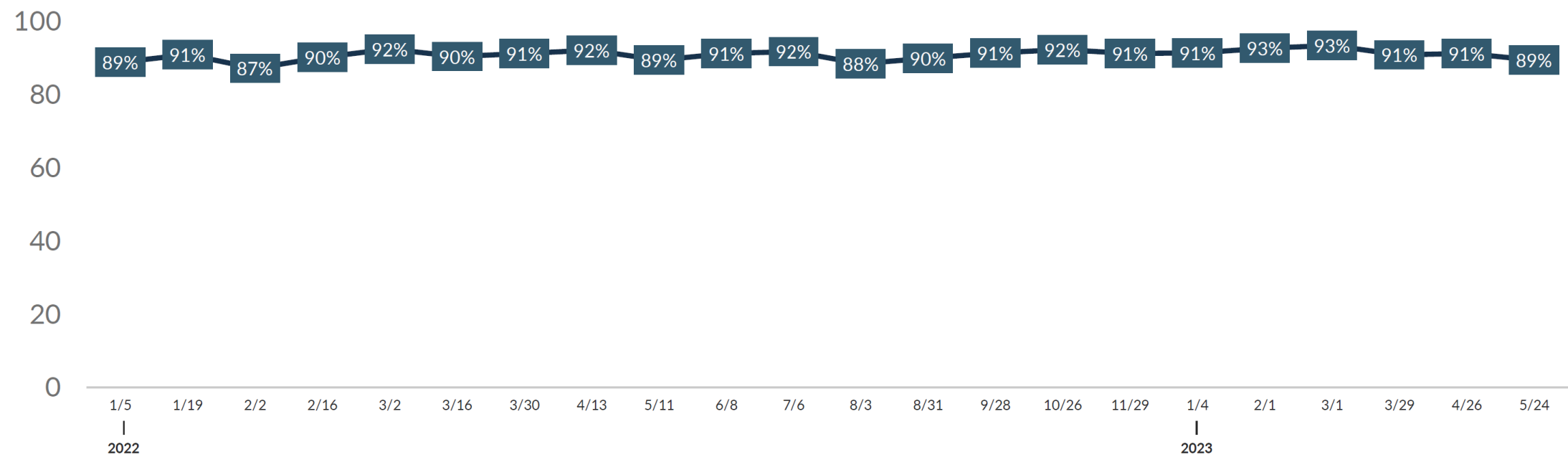
- Mild 2023 3Q/4Q recession will be balanced by strong job market and consumer spending
- Nearly 90% of American travelers have trips planned.
- Economic concerns are dampening some demand, but less than they were earlier in the year
- Average traveler has 3.7 trips planned in the next 12 months

Sources: Destination Analysts, Longwoods International, MMGY, U.S. Travel Association



Impact On Travel Plans

Travelers with Travel Plans in the Next Six Months Comparison



Source: Longwoods International

DEN Continues As The Bright Spot

7th Busiest in the World (*YTD April*)

3rd Best Recovery of Major U.S. Airports (*YTD April*)

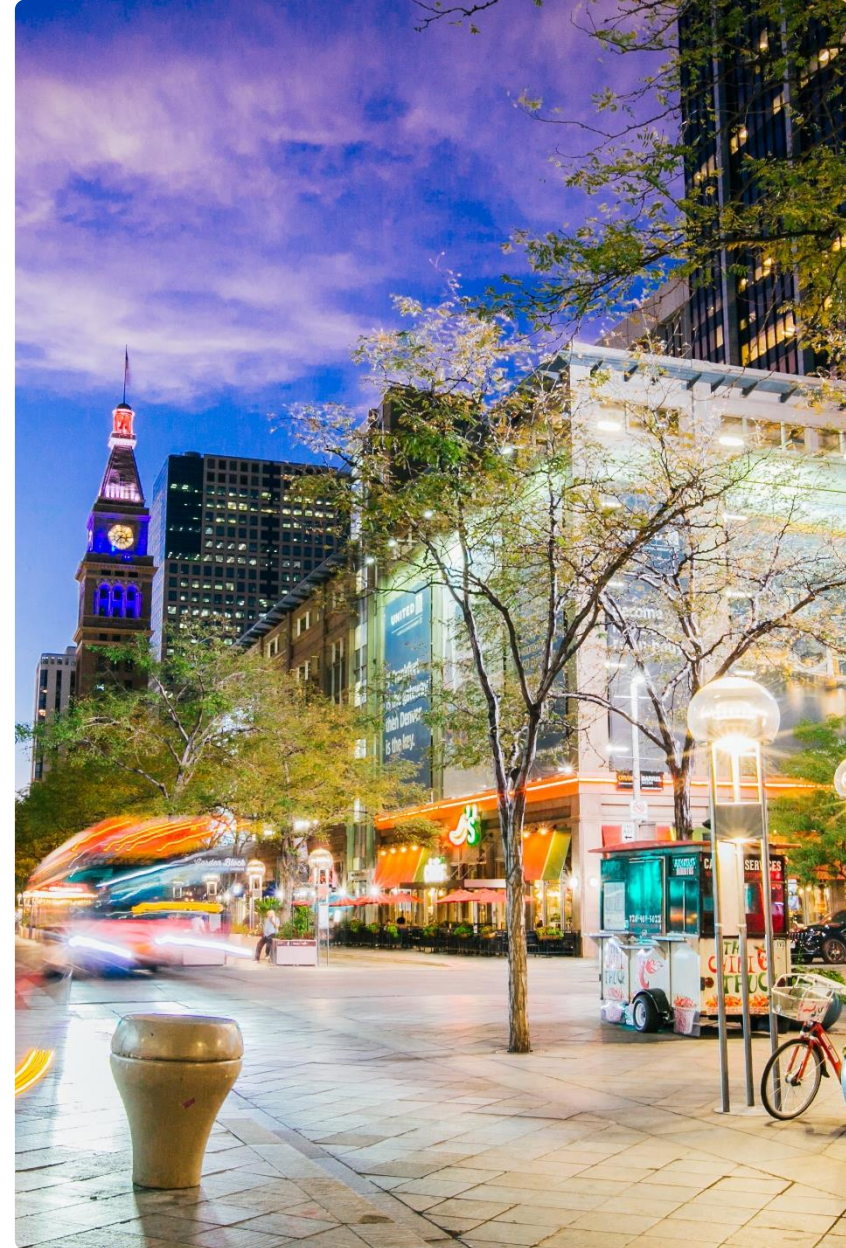
10 Busiest Airports in the World YTD April 2023		
Rank	Airport	YTD April 2023 Total Passengers
1	Atlanta (ATL)	31,623,877
2	Dubai (DXB)	27,867,137
3	Dallas-Ft. Worth (DFW)	24,267,145
4	Delhi (DEL)	23,752,527
5	London/Heathrow (LHR)	23,322,458
6	Tokyo/Haneda (HND)	23,244,513
7	DENVER (DEN)	23,194,149
8	Istanbul (IST)	22,370,516
9	Los Angeles (LAX)	22,345,350
10	Chicago/O'Hare (ORD)	21,745,482

Source: Denver International Airport

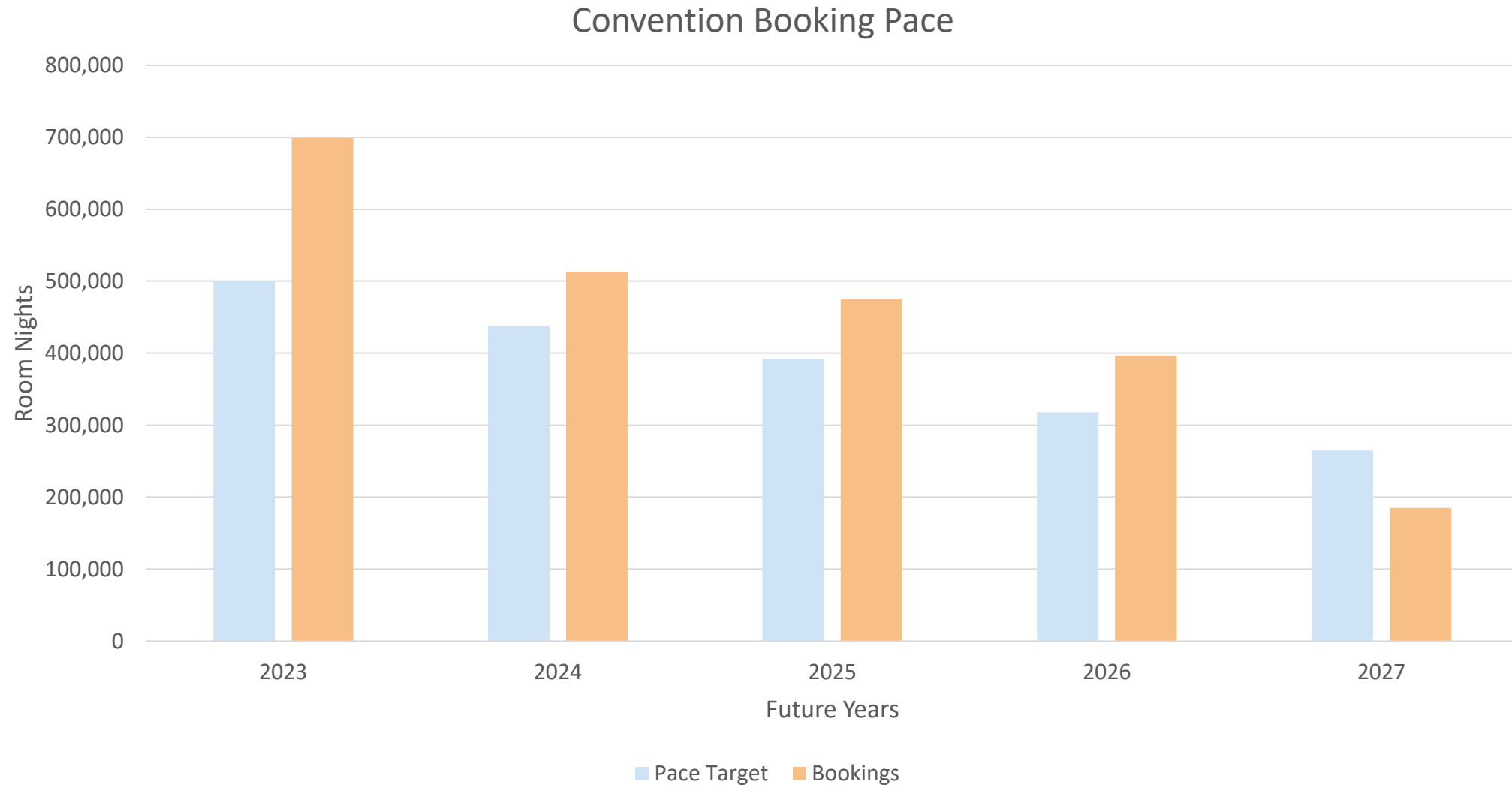


Convention Updates

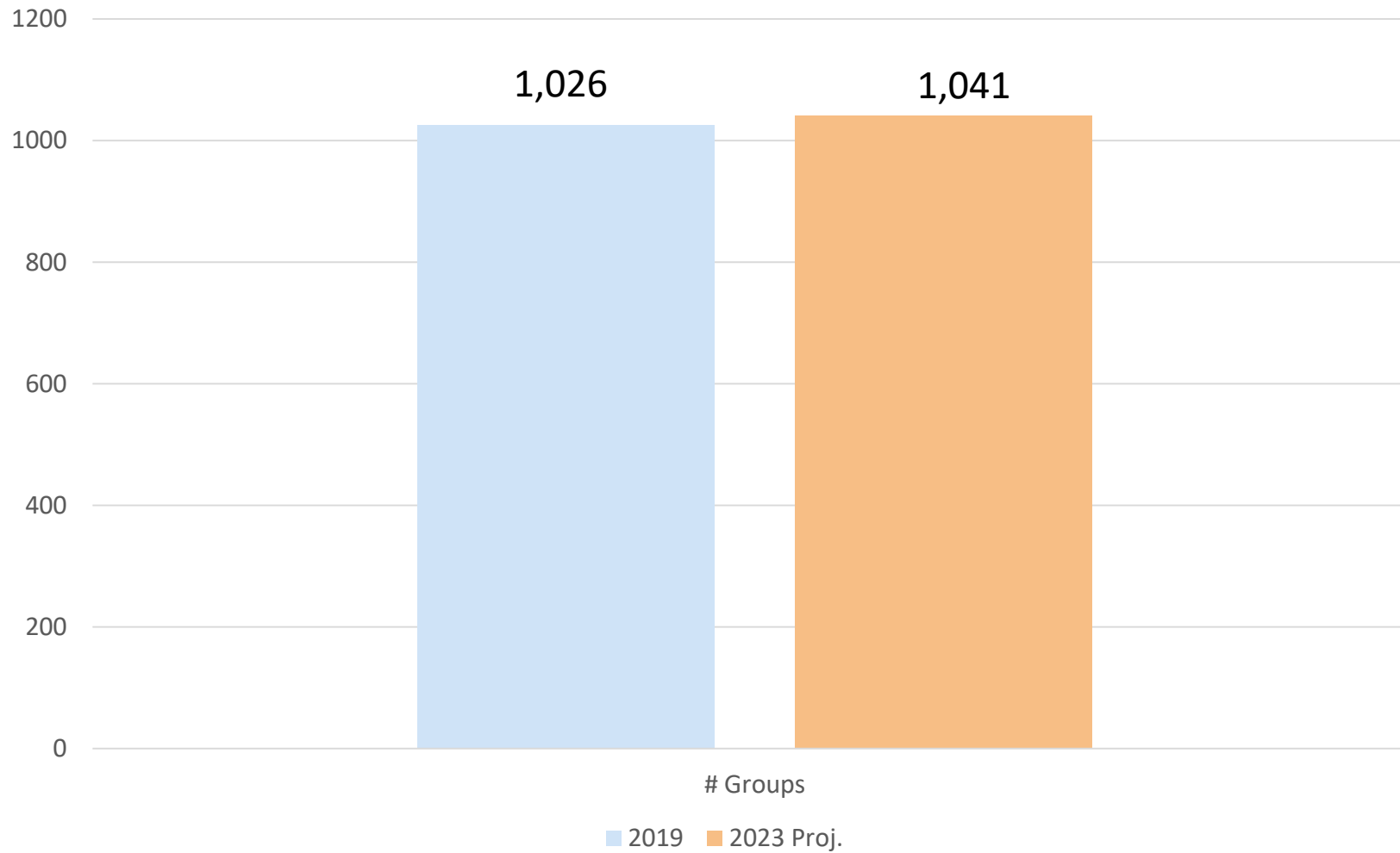
- Record-setting lead volume in 2023
 - Mostly small and midsize groups
 - Citywide leads rebounding
- Site visits back to near 2019 levels
- Citywides are recovering attendance
- Short-term citywide opportunities due to Dallas, Austin, and Orlando relocations
- Downtown environment – improving



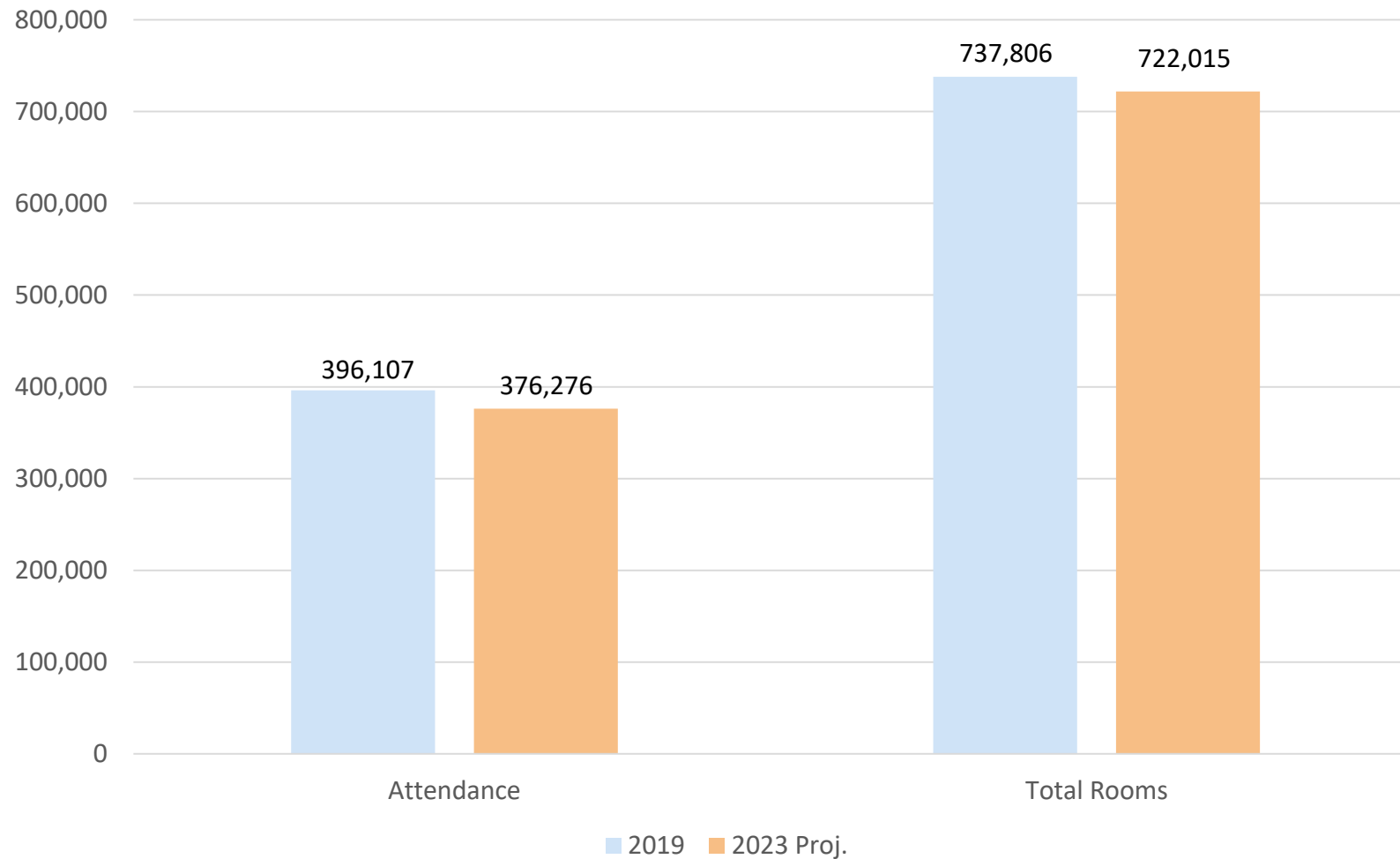
Back On Target For Conventions



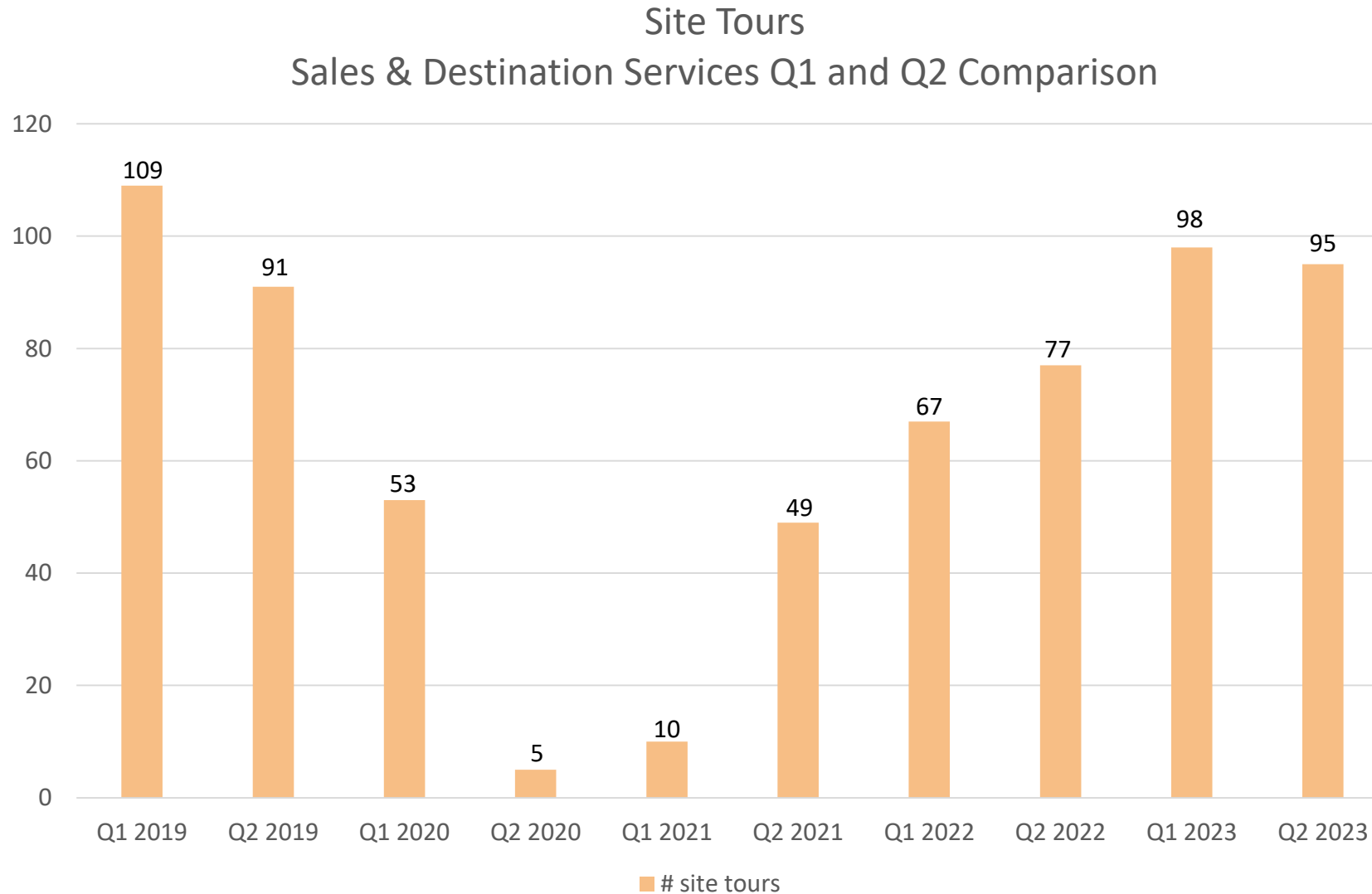
2019 vs 2023 # of Groups



2019 vs 2023 Attendance & Total Rooms



Site Visits



Source: VISIT DENVER

Group Occupancy: 2019/2022/2023 YTD May

	2019 YTD May	2022 YTD May	2023 YTD May
Downtown Denver	24.8%	13.8%	19.8%
Denver Metro	19.8%	12.4%	15.0%

2023 Jul – Sep CCC

- **Fan Expo** June 30 – July 2; 80,000 attendees (national, regional, and local)
- **Family, Career & Comm Leaders of America** July 2-6; 8,500 attendees
- **School Nutrition Assn** July 9-11; 6,500 attendees
- **American Veterinary Medical Assn** July 14-18; 8,500 attendees
- **Cetera Financial Group** July 24-27; 1,600 attendees
- **FBI National Academy** July 29 – August 1; 2,000 attendees
- **American Bar Assn** August 3-6; 5,300 attendees
- **Quility** August 9-11; 4,000 attendees
- **National LGBT Chamber of Commerce** August 15-8; 1,500 attendees
- **NE States Consortium** August 21-24; 1,700 attendees
- **CEDIA Expo** September 7-9; 18,000 attendees
- **GABF** September 21-23; 46,900 attendees (national, regional, and local)
- **International Facility Mgmt Assn** September 26-28; 5,000 attendees



Nearly 190,000 attendees!



Looking ahead to Q4

- American Health Care Assn (ACHA)
- Academy of Nutrition and Dietetics (AND)
- Society of Cable Telecommunications Engineers (SCTE)
- Blackbaud
- CoreNet Global
- Association for Computing Machinery (ACM)
- USA Volleyball
- Jewish National Fund
- Colorado State Thespians



MEET DENVER

AN IMMERSIVE EXPERIENCE IN THE MILE HIGH CITY

MEET
EXPERIENCE
ENJOY
TELL

- Reviving from successful pre-COVID program
- September 20-22, 2023
- Targeting 60-75 planners
- All in-house meeting business
- Typically short-term opportunities
- Opportunities for hotels to participate



Denver Daycation 2023



Colorado Convention Center Expansion

- Remains on track for late 2023 completion
- Booking early 2024!
- Client hard hat tours increasing
- Expansion marketing campaign underway



Denver Sports

- DSC solicits and attracts high-profile events
- Continued consideration for future international soccer matches at Empower Field
 - Target dates summer 2024 and 2025
- NCAA bid cycle
 - Late July 2023: bid portal opens
 - Feb 2024: bid deadline
 - Oct 2024: hosts/sites announced
- DSC and local stakeholders discussing signature events/initiatives
 - Hockey: 2026 IIHF World Juniors, international youth tournaments, annual matchups with DU
 - Statewide funding/incentive programs
- USA Volleyball – just approved December 2024 program (agency is contracting)





Flavia Light
Vice President, Tourism

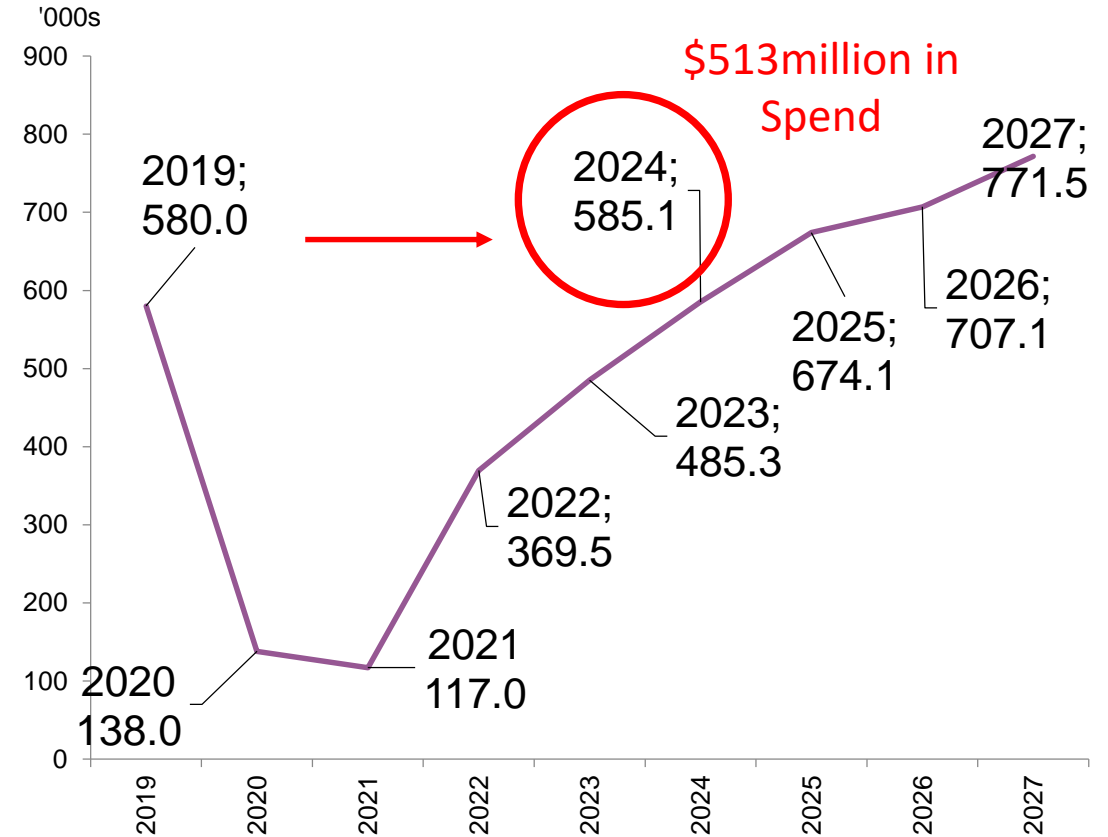
International Focus

109% forecasted growth
from 2022 to 2027



- Visit Denver was awarded a CTO Grant for 2023 and 2024
- Direct representation with Agencies in Canada, Mexico, UK, Germany and France
- Expand PR and Travel Trade efforts

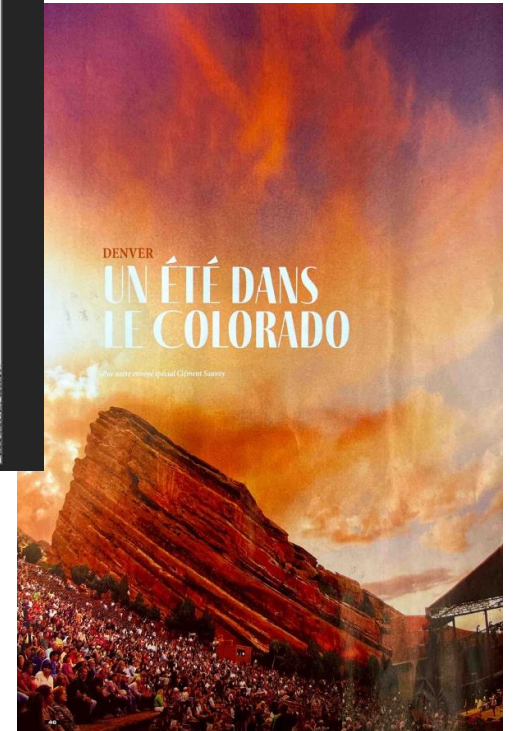
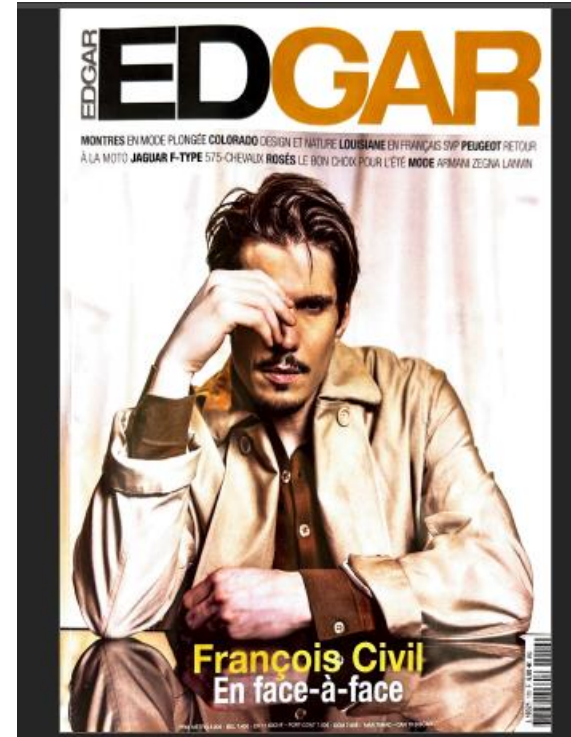
Visits from Total international to Denver



Source: Tourism Economics

International PR Efforts

- International Reps have generated an incremental \$2 million in earned media for Denver in only 3 months
- 7 page spread in EDGAR Luxury Magazine with one of the top French travel journalists



International Marketing Campaigns



- In 2023, we have done 15 marketing initiatives driving 50 million impressions year to date
- Working with Reps in-country to create travel trade education to convert into room nights in Denver

Tourism Update

- Neighborhood Guide Update
 - Reviewing and updating Content
 - Adding an Interactive Map
- Go The Extra Mile
 - Moving to an online program by Q3
- Geofencing Marketing Test
 - Targeting convention and leisure visitors in Denver

Neighborhood Guides



Go The Extra Mile

Key Objectives

- Provide front line staff with an online educational program to learn about all things Denver and the importance of Tourism, as well as access to informational resources.

Components

- New Program Logo
- Learning platform
- Lessons and Videos
- Certificate of completion
- Discounts for Front Line Staff



Geofencing Results

Ranking of Ads:

- 1) Attraction Passes
- 2) Must See Art
- 3) Must See Restaurants

Impressions:
1,242,811

Clicks:
5,717

CTR:
0.46%

Top 10 Partners Visited

Location	Visits
Denver Art Museum	9,260
Denver Botanic Gardens	9,106
History Colorado Center	9,012
Clyfford Still Museum	2,600
Kirkland Museum of Fine & Decorative Art	1,350
Guard & Grace	994
Molly Brown House Museum	643
Colorado Photographic Arts Center	395
Chez Maggy	362
Mercantile Dining & Provision	357

Tourism Branded Programs

- **Denver Beer Week**

Friday, September 15th –
Saturday, September 23rd.





Justin Bresler

Vice President, Marketing &
Business Development

Leisure Demand

- Flight searches for summer travel to Denver **up 38% vs. 2022**
 - U.S. down by 13%
- Hotel searches for summer stays in Denver **up 10% vs. 2022**; 44% of hotels not booked yet
 - U.S. down 8%
- Planning windows
 - Solo travel: 34% planning 30 days or less
 - Couples: 44% planning 30 days or less
 - Families: 26% planning 30 days or less
- Top search markets: Los Angeles*, Dallas*, New York*, San Francisco, Chicago*

*denotes advertising market

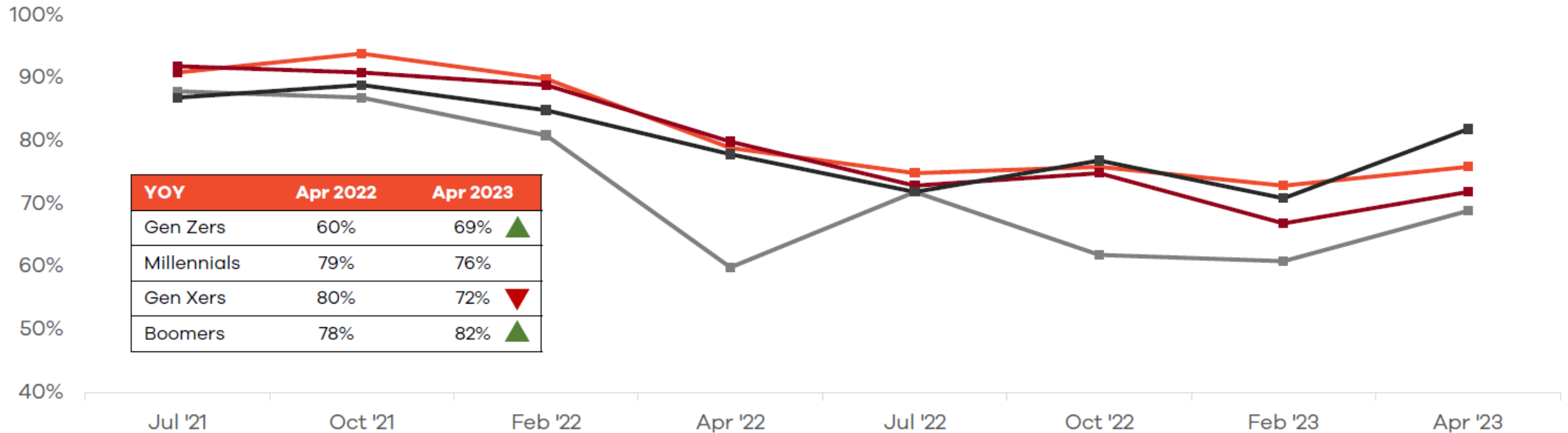
Source: Sojern Summer 2022 Denver Trends



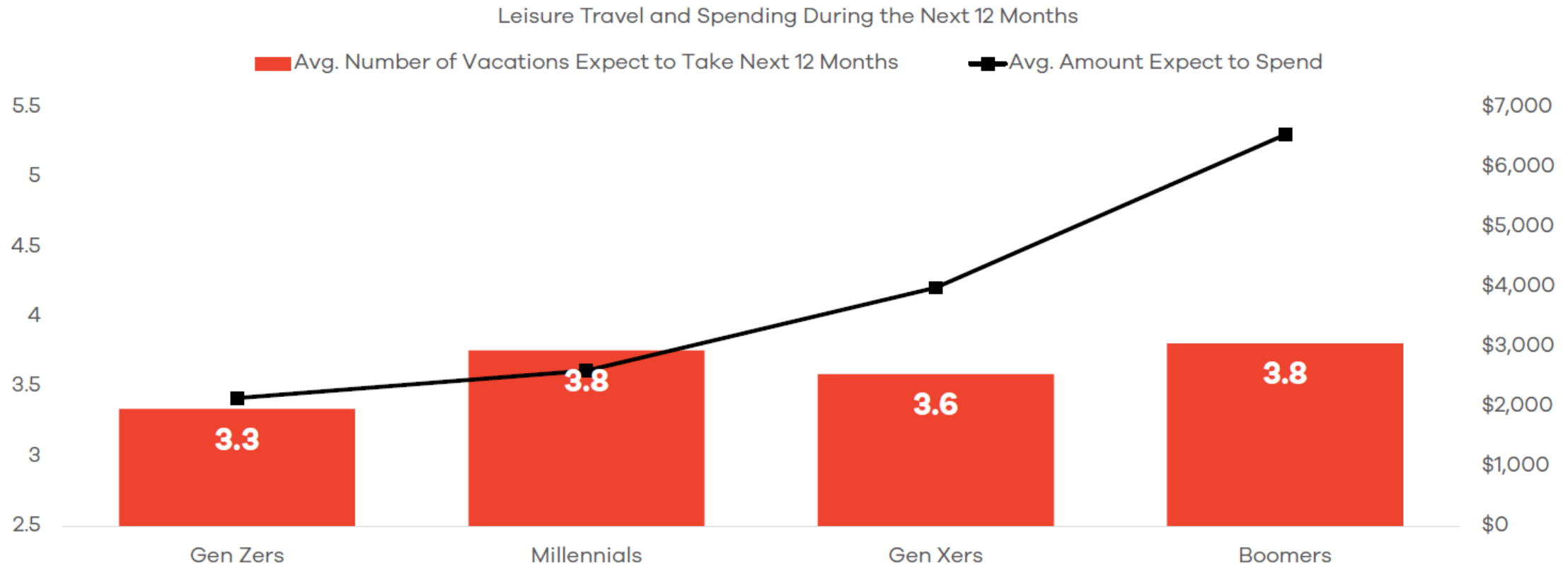
Travel Planning Up for All Generations

Plan to Travel for Leisure in the Next 12 Months

Gen Zers Millennials Gen Xers Boomers



Boomers: More Trips, More Spending



Demand for Denver & Colorado Remains High!

Colorado = #4

Rank	Destination	% Interested
1	Hawaii	66% ▲
2	Florida	59%
3	California	55%
4	Colorado	53% ▲
5	Alaska	52% ▲
6	New York	49%
7	Nevada	48% ▲
8	Arizona	44%
9	Texas	41%
10	North Carolina	38%
11	Tennessee	37%
11	South Carolina	37%
13	Georgia	36%
13	Washington	36%
15	Maine	35%
16	Montana	33%
16	Louisiana	33%
18	Massachusetts	32%
19	Oregon	31%
20	New Mexico	29% ▼

Rank	Destination	% Interested
1	Island of Hawai'i	61% ▲
2	Honolulu, HI	60% ▲
3	Maui, HI	58% ▲
4	Las Vegas, NV	55%
4	Kaua'i, HI	55% ▲
6	Florida Keys/Key West, FL	53%
7	Lanai, HI	48%
7	New York City, NY	48%
9	Orlando, FL	47%
10	San Diego, CA	46%
11	Niagara Falls, NY	44%
12	New Orleans, LA	43% ▲
12	Miami, FL	43%
12	Nashville, TN	43%
12	Tampa/St. Petersburg/Clearwater, FL	43% ▲
16	San Francisco, CA	42%
17	Denver, CO	41%
17	Los Angeles, CA	41%
17	Palm Beach, FL	41%
17	Washington, D.C.	41%
21	Myrtle Beach, SC	40%
21	Fort Lauderdale, FL	40%
23	Phoenix/Scottsdale, AZ	39%

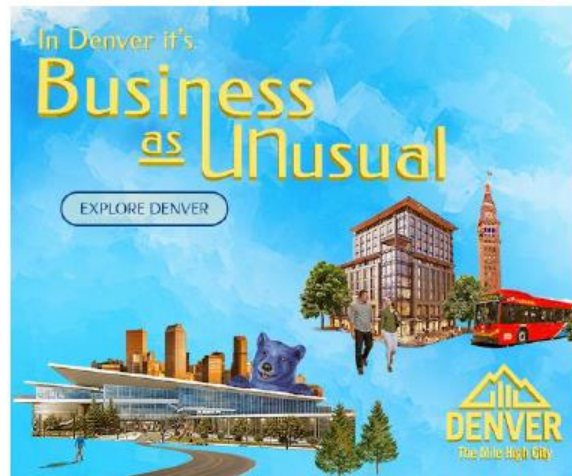
Denver = #11 if you roll up all Hawaii and Florida destinations.

Q3 2023 Campaigns

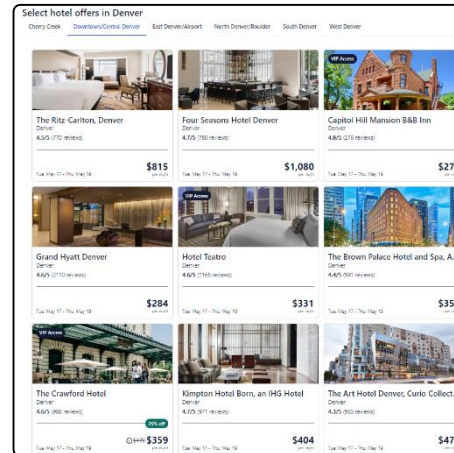
Spring/Summer National



Business as Unusual



OTA Co-op



Regional Events



Colorado Convention Center Expansion



Hispanic/Latino



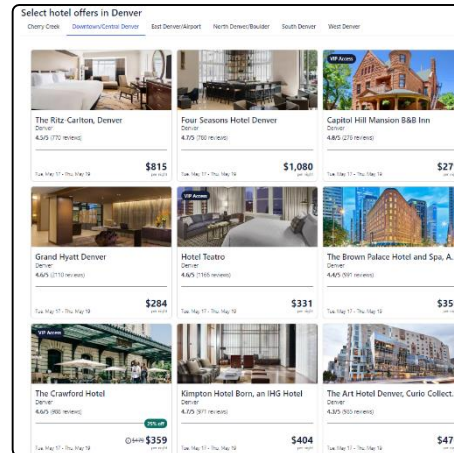
Key Results Through June

Spring/Summer National



- 189 million impressions
- 962k conversions to website

OTA Co-op



- 4.4 million impressions
- 52 room nights
- \$11.3 million in sales

Regional Events



- 64 million impressions
- 276k conversions to website

Hispanic/Latino



- 19 million impressions
- 30k conversions to website

Fall/Winter Campaign Update

Denver Arts Week



- Local market
- Oct. 6 – Nov. 10
- Promotes signature DAW events
 - First Friday Art Walks
 - Night at the Museums
 - Denver Film Fest
 - And hundreds of cultural events city-wide

Mile High Holidays



- Regional market
- \$1 million+ value!
- Nov. 6 – Dec. 31
- Promotes all things holidays
 - Light displays
 - Holiday performing arts
 - Shopping
 - The Mile High Tree
 - Holiday hotel deals
- NYE and NWSS
- Co-op opportunities available

Winter Basecamp



- National market
- Oct. 1 – Dec. 31
- Promotes Denver to people planning Colorado mountain vacations

New! Michelin Guide

- Leading global brand for restaurant reviews
- Huge brand upgrade for national, international and conventions markets
- Partnership with Colorado Tourism office and other cities (Boulder, Aspen/Snowmass and Vail/Beaver Creek)
- Restaurant announcements this fall
- Awards for: Star, Recommended, value & sustainability



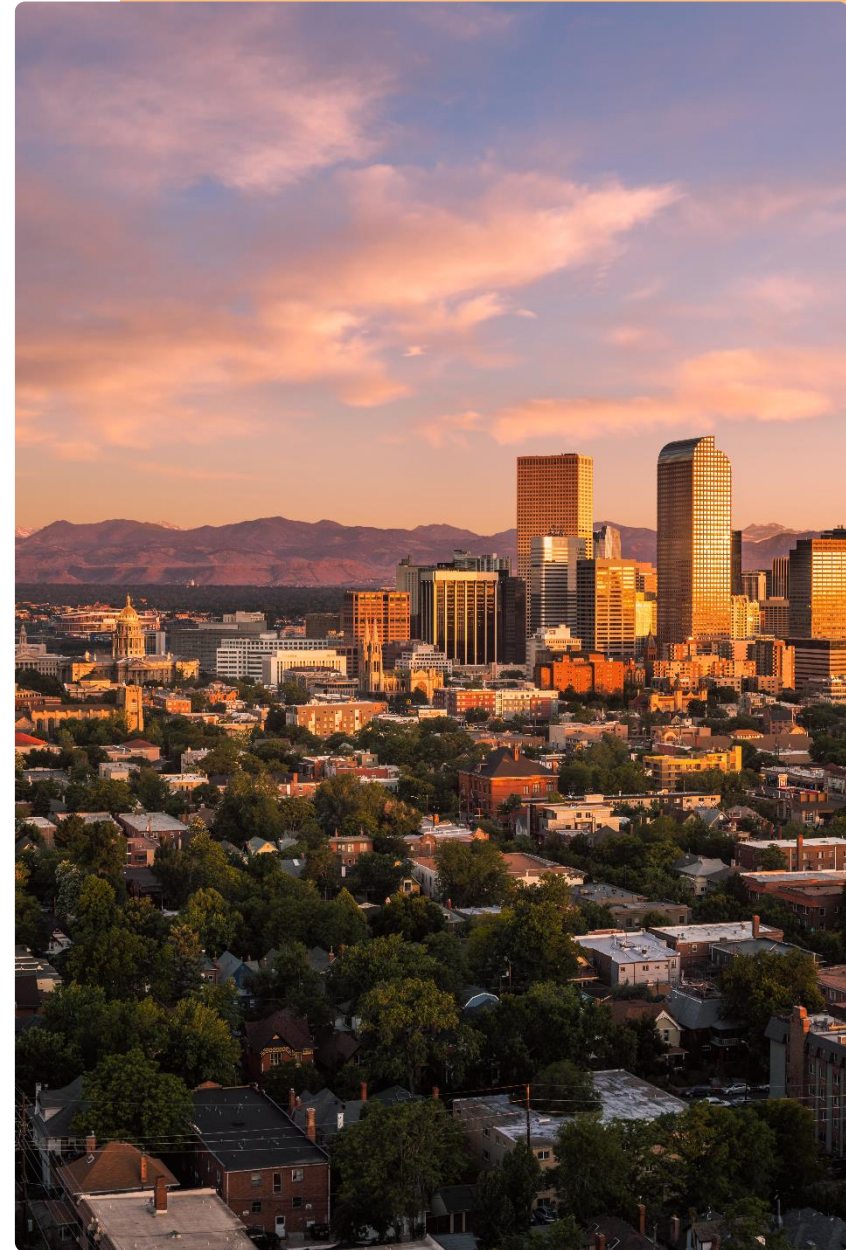


Allison Kohn

Director, Government &
Community Affairs

City Update

- New Mayor and City Council
 - Inauguration day – July 17
 - New Council president elected
 - New Council members in Districts 4, 7, 8, 9 and At-Large
- Vibrant Denver and transition committees
- [iViva! Streets Denver](#) – Sunday, August 6 (last date for the summer)
- Summer at Skyline Park – DDP activations
- 16th Street Mall Update



November 7, 2023 Election

- Colorado ballot:
 - Tobacco and Nicotine Product Tax Revenue Measure
 - Property Tax Changes and Revenue Change Measure
- Denver ballot:
 - Voting on 3 board seats for DPS
 - Potential Denver citizen referred measures
 - Fur Ban
 - Slaughterhouse Ban
- More to come!





MC Genova

Director, Partnership and
VISIT DENVER Foundation

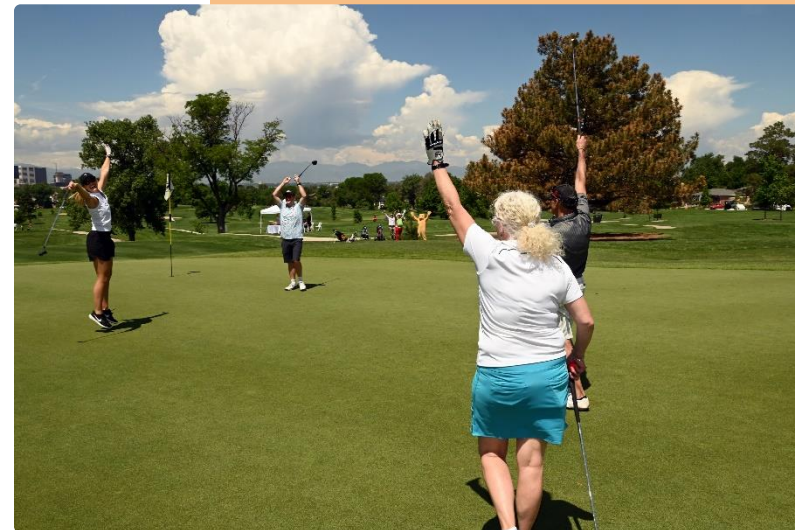
2023 Partnership Update

- **Get Involved!** Attend monthly partner networking events and workshops
- Review and Update Your Partner Listings
 - Upload Deals & Discounts
 - Update Venue Information
 - Utilize Threshold 360 (360-degree capture for hotels and venues)
 - Add public events to the Denver365 Events Calendar
 - Submit a hotel deal
 - Minority-owned & Woman-owned (through Extranet amenities tab)
- Advertise on VISIT DENVER platforms



VISIT DENVER Foundation

- Awards scholarships to college students in Colorado who are pursuing a degree in Tourism & Hospitality
- ***Thank you*** for your support of the 36th Annual VISIT DENVER Foundation Cup & Partnership Open in June
 - Raised more than \$25,000 for scholarships
- Fundraising Year To Date:
 - In 2023, awarded \$120,000 scholarships to 38 students
 - Awarded more than **\$1.5M** to **525 students** since 2000
- University Hospitality Programs
 - Colorado Mesa University
 - Colorado Mountain College
 - Colorado State University
 - Metropolitan State University of Denver
 - University of Denver
 - University of Northern Colorado



Save The Dates!

- **Venue Partner Workshop - NEW**
 - Wednesday, August 30, 3 – 5 pm at Mile High Station
 - Venue partner benefits overview
 - Networking
- **114th Annual VISIT DENVER Partnership Meeting**
 - Wednesday, November 8 at the Seawell Ballroom
 - Breakfast meeting, year-in-review, Mile High Energy award, keynote speaker
 - Free! Bring your team





Thank You to Our Host:
Tom's Watch Bar